Guide to using

FILES2000 for Windows

Version 1.7
May 2002

Contents

FILES2000 for Windows

This User Guide

The FILES2000 User Guide is a step-by-step instruction handbook identifying how to use the FILES2000 system program. It should be used to guide the user through the various steps and screens involved in all the standard functions of the FILES2000 application. It may be found on the Internet at our web site: http://files.icp.navy.mil. The instruction found here corresponds to the online help available within the application and the training course also found on the web site.

FILES2000 for Windows

What is FILES2000
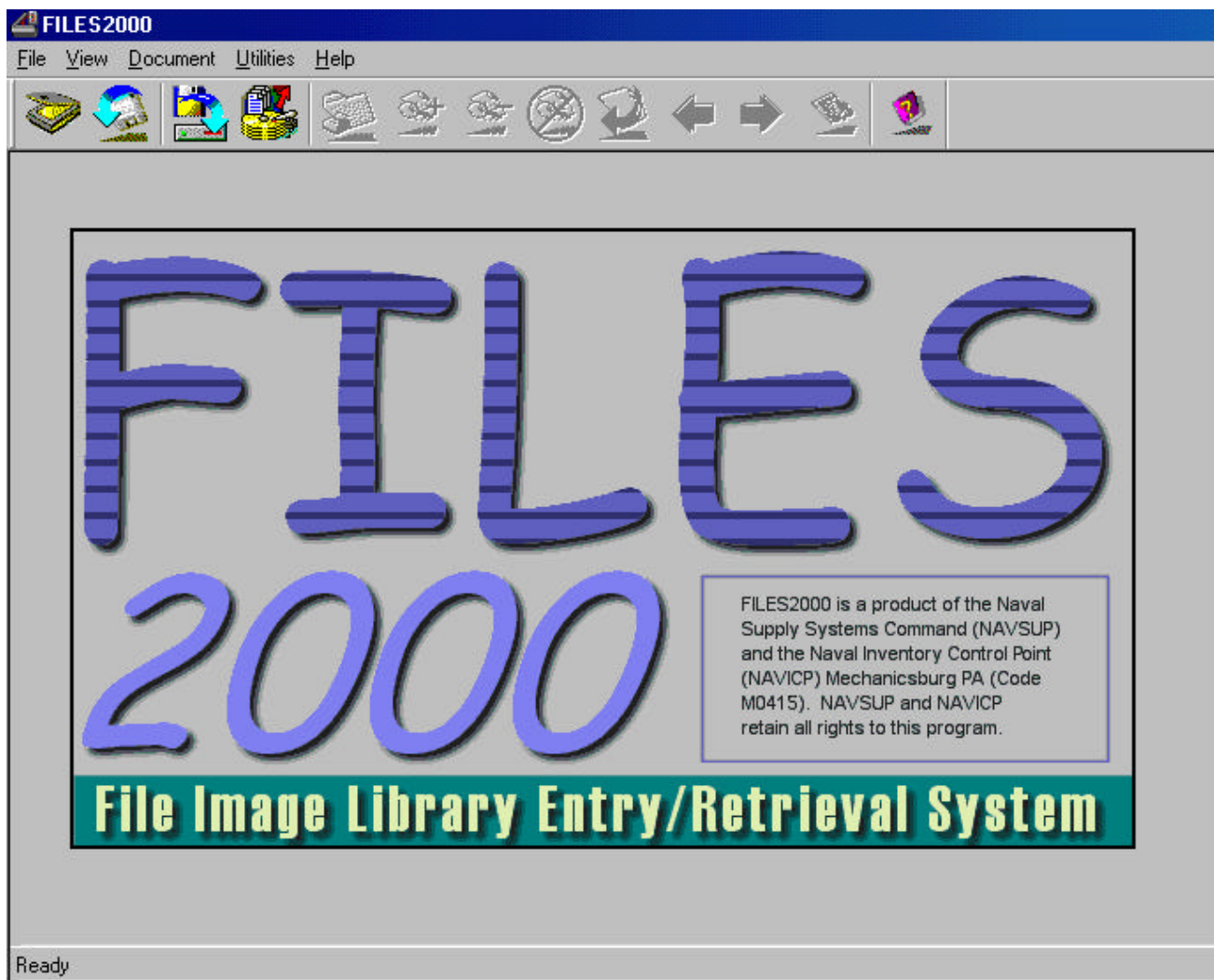
FILES2000 Splash Screen

FILES is an acronym for File Image Library Entry/Retrieval System. It was completely rewritten in the year 2000, thus we call it FILES2000.

FILES2000 is an image archiving and retrieval system. It is designed to archive and retrieve documents using PCs with scanners and bar code reading wedges attached. It operates in a stand-alone or network mode and runs in a Microsoft Windows environment.

FILES2000 archives documents and allows the stored documents to be retrieved using predetermined index keys. They can be displayed on PC terminal screens or printed on a laser jet printer. The images are stored on an optical disk jukebox, optical disk drive, PC hard drive, or network drive.

FILES2000 is owned by the Navy and is available to all DoD activities. It is generally used at storage activities. It is used primarily for supply documents such as issues and receipts, but can be used in a variety of applications.

The goal of FILES2000 is to provide Navy and other DoD customers a high quality and low cost scanning, archiving, and retrieval system that will improve document storage and retrieval operations for inventory accuracy and causative research.

Specifically, this program is a product of the Naval Supply Systems Command and Naval Inventory Control Point - Mechanicsburg (NAVICP-M), Code 0411. Questions and/or suggestions for improvement of this product should be directed to NAVICP-M (Code 0411) at (717) 605-9175 or DSN 430-9175.

Getting Started

When FILES2000 is installed on your workstation, the following icon will appear on your desktop:
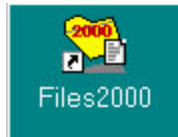
Double click on it to go to the FILES2000 main menu.
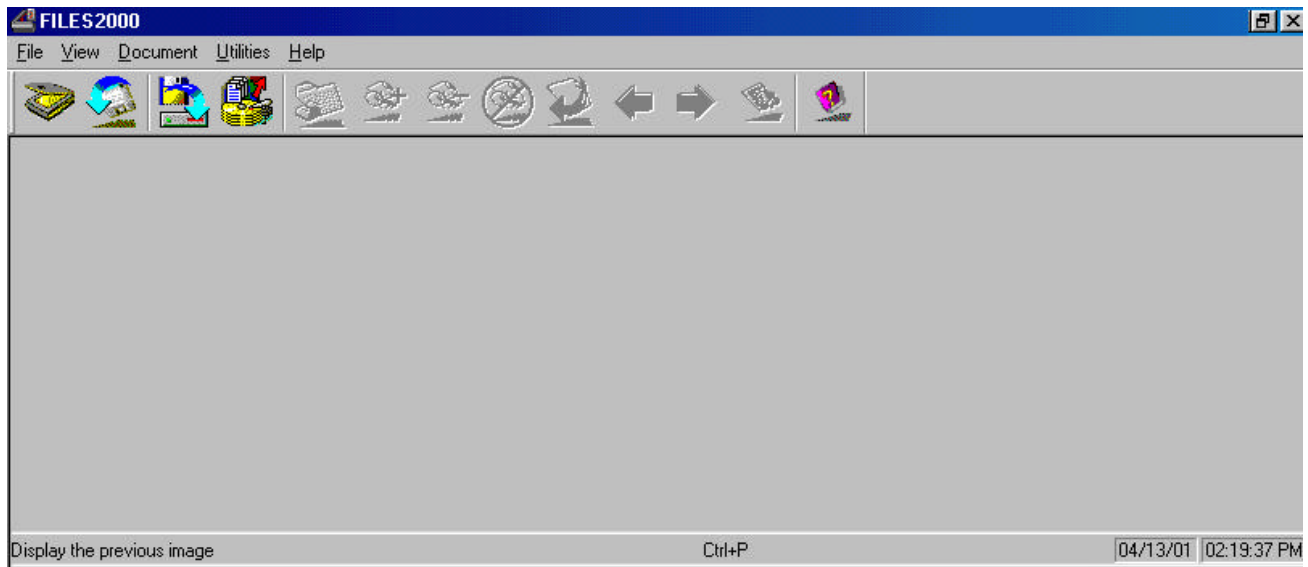
FILES2000 Main Menu Screen

From the main menu, you can start any of the major operations of FILES2000. These operations include scanning (if your workstation is configured for scanning), retrieving scanned images from temporary storage on your PC's hard drive, moving scanned images and key data from your local drive to network storage (network drives or jukebox), and retrieving selected scanned images from network storage. Administrators can also change passwords, change configuration settings, create new document types, and purge documents based on certain criteria.

Using Toolbar Buttons

Following is a detailed description of buttons on the toolbar and how to use them:

	Scan	From the Main screen, click this button to select a scanner and document type, and then scan documents. After scanning, you will be able to enter key data for each document.
	Retrieve Local Images	From the Main screen, click this button to retrieve images from your local drive.
	Move to Network	From the Main screen, click this button to move images from local drive to network storage.
	Retrieve from Network	From the Main screen, click this button to search for documents on the network storage device or jukebox.
	Print	Selecting the **Print** icon allows you to print all pertinent data or extracted information.
	Zoom In	From the Image screen, click this button to enlarge the image.
	Zoom Out	From the Image screen, click this button to reduce the image.
	Snap Back	From the Image screen, after you have enlarged or reduced the image, use this button to return to the normal size.
	Rotate	From the Image screen, click this button to rotate the image 90 degrees.

	View Previous Record	From the Image screen, click this button to see the previous record.
	View Next Record	From the Image screen, click this button to see the next record.
	Close	Selecting the **Close** icon will close the current screen. This button is only available on the Full Page view.
	Help	Selecting the **Help** icon will access the online help.

The Scanning Process

Scanning is the process by which documents are run past a light-sensitive device (scanner) to convert the image into a digital format so it can be stored electronically. For each document scanned, the user assigns the appropriate index keys, which will be used to identify that particular image.

To go to scan from the main menu, perform one of the following:

- Click on the **Scan** icon on the toolbar.
- Select **Document, Scan** from the menu bar.
- Use the hot keys Ctrl + S.

Note 1: You can only do this if your workstation has been set up as a scanning station. (See Utilities section later.)

Note 2: FILES2000 has the option of using drivers associated with your particular scanner or using the drivers internal to the FILES2000 application. (See Utilities section later)

Note 3: FILES2000 also has the option of using automatic bar code recognition.

Scanner Settings

If you are set up to use Internal Files drivers, the system will take you to the following screen where you will select your scanner settings.

Scanner Settings Screen
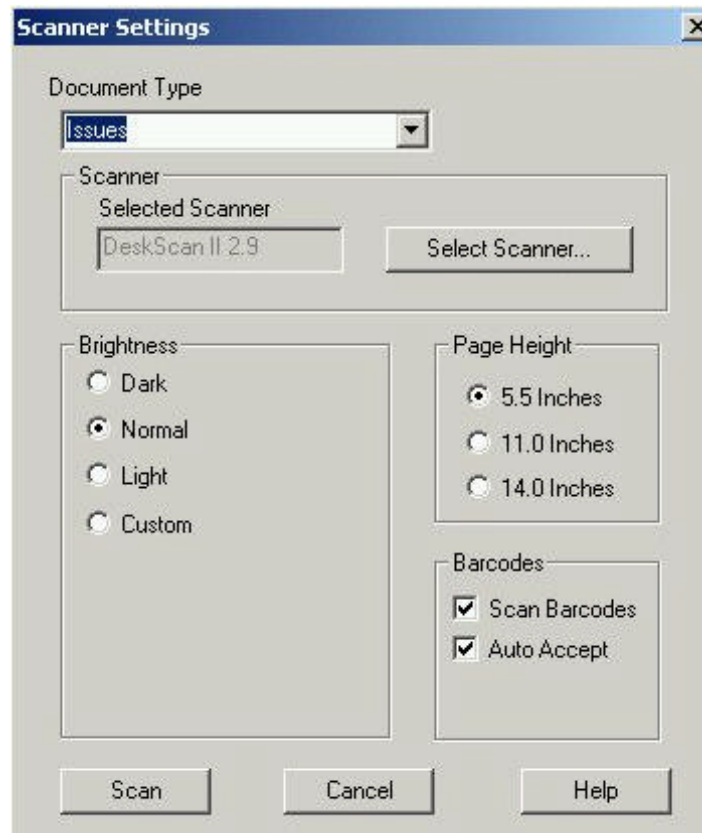
Scanner Settings Screen

To scan documents, you must:

- Select the Document Type to be scanned by using the drop down box at the top of the Scanner Settings dialog box. All types necessary for your particular station should already be loaded. If they are not, contact your local FILES administrator.

- Select a scanner. If the scanner shown as Selected Scanner is the scanner you want to use, you do not have to click on the **Select Scanner** button. If you do want to change the scanner, click on **Select Scanner** button and choose from the listed scanners in the Select Source box. Generally once this is set, you shouldn't have to change it unless you get a different scanner.
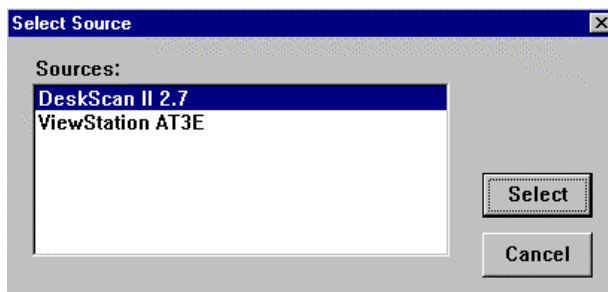
Select Scanner Screen

- Select a Brightness setting. Usually you can stay with the Normal setting. You can select another setting by clicking on the desired option. If none of the Dark, Normal, and Light settings are satisfactory, click on **Custom** to display a slide bar where you can choose values in between the standard settings. For example, use custom settings when the original document is a different color.

- Select a Page Height that corresponds to the size of the documents you are about to scan.

If you are set up to use your scanner's drivers, the system will take you to the following screen: Notice the "Using Driver Dialog" message. You cannot select your scanner settings here.

Scanner Settings Screen
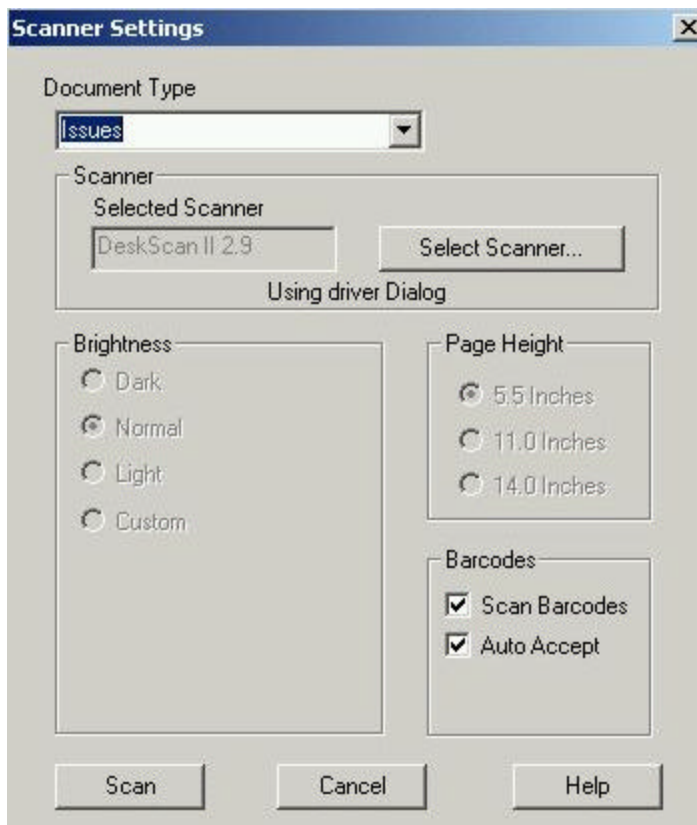
Click on the **Scan** button, and the dialog box for your scanner's drivers will appear. The look and function of this box will depend on what brand of scanner you are using. Each of their dialog boxes will be different. The following example is from a Bell & Howell scanner:
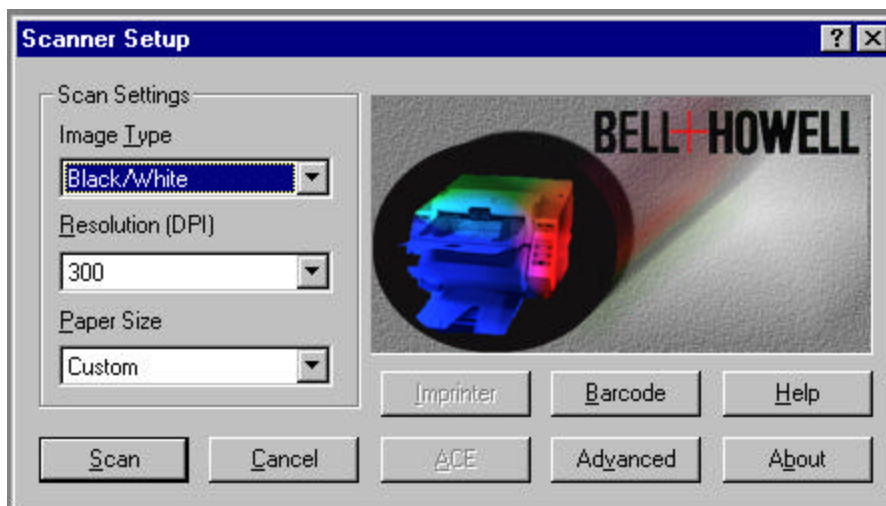
You may change the scanner settings if desired.

Scanning Documents

- Load the documents to be scanned into the Automatic Document Feeder (ADF) of your scanner. They generally go in face up. The maximum number you can scan at one time is determined by the capacity of your ADF. To minimize problems, you should not load more than 20 documents at one time.

- If you do NOT want to scan at this time, click on the **Cancel** button.

- Click on the **Scan** button. The progress of each document being scanned may be shown in a progress bar on the screen.
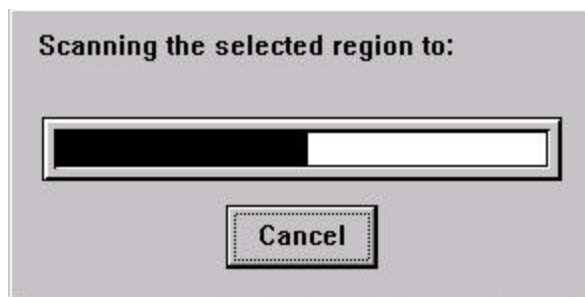
- The images are saved in FILES in a temporary file as they are being scanned. Once all documents in the batch have been scanned, the program will display the Enter Keys for Scanned Images screen. The first document that was scanned will be displayed.

Entering Index Keys

On this screen, the scanned images will be displayed on the left side, starting with the first image scanned. The grid on the top right is used to enter data for the document keys for each image.

The following is the normal process for entering key data for the scanned images:

- Get documents from scanner.

- Verify that the image displayed is the correct document for the index keys you are about to enter.

- Verify that the image is readable and is of satisfactory quality.

- If the image needs rotated, press the **Rotate** button until the image is how you want it.

- If the cursor is not in the first row of the Value column on the data grid, click once on this field to move the cursor there.

- Type in or wand in (via bar code reading device) the data for each key based on the document displayed on the left side. If the name of the Key is shown in **bold** print, this field is a mandatory entry.

- Some key fields have a maximum number of characters that can be entered. Depending on how your administrator configured the form, the field will either stop accepting characters, or it may move automatically to the next field if the two fields are frequently combined.

- Use the **Tab** key to move down through the grid, entering data as directed by local procedures.

- After entering data in the last row, pressing **Tab** will highlight the **Accept** button. If all of the key data you entered is correct, press Enter to accept the document and the key data.

- The next document will be displayed. If there are no more scanned images in this batch, the image field on the left will be blank (yellow).

The buttons on this screen function as follows:

- **Accept** – Saves the image to local storage and adds the key data entered to the database.

- **Delete** – Deletes the image from the scan batch. If the document did not scan satisfactorily, use this button to delete the image and rescan the document later.

- **Scan** – This button will redisplay the Scanner Settings dialog box so that you can scan another batch of documents. Use this button only after you have entered key data for all images in the current batch.

- **Cancel** – Returns to the main menu screen.

- **Ditto One -** This function will copy the key data from the previous image to the current image. This is helpful when you have a multiple page document and each image must have the same set of key data.

- **Ditto All** - This function will apply the keys entered on the current form to all of the forms in the current scan batch. This is helpful when you have a larger multiple page document and each image must have the same set of key data

- **Multi Key** – This button enables users to enter multiple documents for one scan. A table will be displayed where multiple rows can be entered with one or more index keys that have a common value (e.g. one document number with several stock numbers). See further explanation on the next page.

- **Rotate** – This button will rotate the image 90°. Use it to get the image right side up. The image will be saved in the upright position.

- **Full Page** – If you need to see a larger version of the scanned document, click this button for a full screen image.

- **History List** – This will display a list of the key data already entered for this scan batch. You can use this feature to verify entered information, or to determine where you are in the processing of the images. See further explanation on next page.

These Toolbar buttons are also available for use:

- Print

- Zoom In

- Zoom Out

- Snap Back

- View Previous Record

- View Next Record
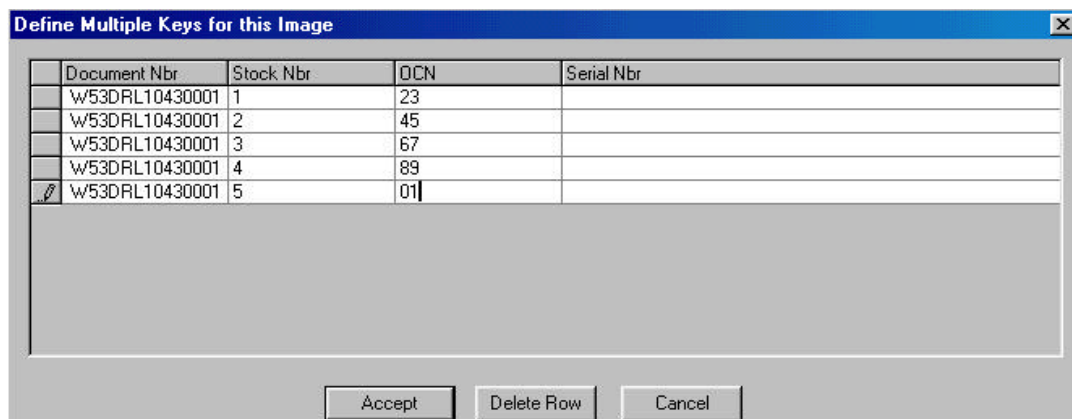
Multikey Processing. Users will activate this function when they want to enter multiple documents from one image. The most common examples are when there is a Bill of Lading with multiple TCNs or a DD250 with multiple stock numbers. Basically, use the following procedures:

- Scan the document (usually more than one page).
- Assign the value(s) that will be constant for all the multiple documents.
- Press the **Multi Key** button. A table like the following will be displayed:

Document Nbr	Stock Nbr	OCN	Serial Nbr
▶ W53DRL10430001			

Accept   Delete Row   Cancel

- Users will then enter all the remaining keys that should be unique to each document you want to provide indexes for (e.g. all the TCNs for a particular GBL or, like below, stock numbers for a particular document number). Enter the values for the first line, and then press tab and a new row will be created. An unlimited number of rows may be created. Press the **Accept** button when you are finished.

- If there is more than one page, the second page will be displayed. You will want to have the same index keys assigned to that page also. So press the **Ditto One** button (or **Ditto All** if there are more than two pages to the document). A table with the previous keys assigned like the one above will be displayed. Press the **Accept** button to accept it.

Magnify function. FILES2000 also includes a magnify function which enables users to enlarge a section of an image. To do this, hold the left mouse button down and drag to create a box around the image area you want magnified. A new enlarged image of the selected area will appear in the display box. Use the **Snap Back** button to return the image back to its original size.

Additional Zooming. FILES2000 has an additional capability that allows users to customize their zooming. To do, on the menu bar click **View,** and then **Zoom**. Users then have the option to select 1x, 2x, 4x, 8x, 16x, or 32x and the image will be enlarged that number of times.

Stopping before you're finished. If, for some reason, you have to stop entering the index keys before all the images have been processed, FILES2000 will display the following dialog box. You have to make a decision about the unprocessed scanned documents that remain.

If you want to keep the existing documents and start scanning again, click on the first button. The system will save your unprocessed images.

If you want to get rid of the remaining documents and start scanning again, click on the second button. The system will ask you to confirm that you want to delete them.

If you want to go back to entering index keys, or somewhere else, click on the **Cancel** button. The system will save your unprocessed images.

Scanning using Bar code recognition.

Effective with release 1.7, FILES2000 includes the capability to utilize automatic bar code recognition. This means that the bar code is read during the scanning process and the data contained is placed into the index key fields. The scanner operator does not have to manually input or wand those index fields. Currently, FILES2000 can only be utilized on the form DD1348/IRRDS and for document types where the first two index fields are document number and stock number.
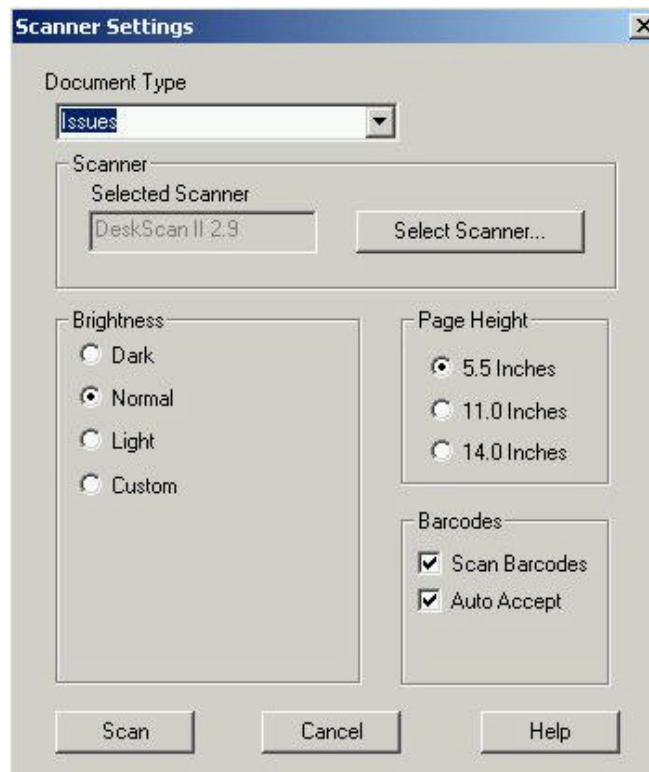
**Scanner Setting Screen**

One option users have is to have FILES2000 "Auto Accept" the image. If the barcoded document number and stock number are read, and there are no other mandatory entries for your document type, it will automatically "accept" that document without any further action by the operator. Any documents where one or both of the bar codes cannot be read will be displayed for index key entry

like normal. A message will be displayed on the bottom of the screen notifying you how many documents were automatically accepted.

 If you want to utilize this capability, you make that choice in the Barcodes box in the Scanner Settings screen. Click in the spaces befo re Scan Barcodes and Auto Accept to activate those options. The Barcodes box is active regardless of whether you are using the internal FILES drivers or your scanners driver dialog.

Retrieve Scan History Screen
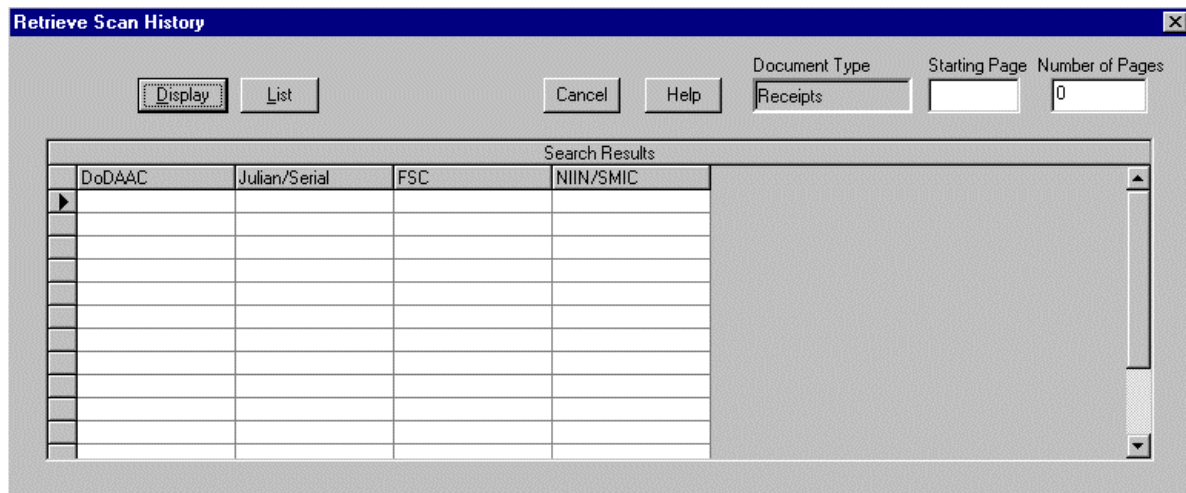
This dialog box will appear when you click on the **History** button on the Enter Key Data screen. The grid will display the key data that you have entered for the current batch of scanned documents. You will not see information on scanned documents without key data.

The buttons and controls on this screen provide the following functions:

- **Display** – Will display an image of the document selected in the grid. The currently selected document is identified by the ▶ symbol in the left margin of the grid. You can also double-click on a row in the grid, and the image will be displayed.

- **List** – This button will refresh or update the list displayed in the grid.

- **Cancel** - Click on this button to return to the Enter Key Data Screen.

- **Help** - This help file will be displayed.

Retrieving Images from the Local Drive

Scanned images are stored first on the local hard drive of the scanning station. After key data is entered for scanned images, documents can be retrieved by searches on the key data while the documents are still on the scanning station's hard drive. This is the Retrieve Images from Local Drive function. This function is used at Scanning Stations to verify that the index keys and image match and/or that no errors were made when entering the index keys. Any necessary corrections are made at this time.

To go to Retrieve Images from Local Drive from the main menu, perform one of the following:

- Click on the **Retrieve Images from Local Drive** icon on the toolbar.
- Select **Document, Retrieve Images from Local Drive** from the menu bar.
- Use the hot keys Ctrl + L.

The system will take you to the following screen:

Note: You can only do this if your workstation has been set up as a scanning station. (See Utilities section later.)

Retrieval Screen

1. Click on the Document Type drop down box and select the desired document type. The search keys in the grid on the left will change to the appropriate keys for the selected document type.

2. Enter search values for as many keys as you desire. You can enter an entire key value (example DoDAAC = N52691) or just a partial key (at least 3 characters). Since you are retrieving from the local drive, you do **not** have to enter any keys, but you must select a document type.

3. You may enter a number in the Starting Page box to skip over the first documents found in the search. If you enter 25 in this box, the first document listed in the Search Results will be the 25th document found that matches the search criteria.

4. When you have entered the search criteria, the buttons across the middle of the screen will provide the following functions:

    - **Count** - The number of documents matching the search criteria will be displayed in the Number of Pages field, and on the title bar of the Search Results grid.

    - **Display** - This will display the first document matching the search criteria. Once you are on the display screen, you may use the arrow icons on the toolbar to move to other matching documents (if any).

    - **Change** – This button will allow users to correct erroneous index key data for a specified record.

    - **List** - This button will display key data for the first 15 documents matching the search criteria.

- **More** – The grid will display only 15 documents at a time. If there are more than 15 documents to be displayed, this button will update the display grid with information for the next 15 documents.

- **Previous** - The grid will display only 15 documents at a time. If there are more than 15 documents to be displayed, this button will update the display grid with information for the previous 15 documents if you have moved past the first group of 15.

- **Print** - The currently selected document will be printed.

- **Delete** - This button will allow users to delete an erroneous record.

- **Print Header** – If this box is checked, header information listing all of the keys for the selected document will be printed on a separate page from the image.

- **Clear** – This button will clear all of the search criteria values that you have entered in the search criteria grid.

- **Cancel** – This will return you to the main menu screen.

- **Help** – This will display the help file.

Changing Index Keys

If one of the index keys contains an incorrect value, it may be corrected at this time. Also if an image is not scanned right side up, it can be rotated and re-stored. After pressing the **List** button, put the cursor on the incorrect record and press the **Change** button. The following screen will appear with the appropriate image and index keys displayed:


- Move the cursor to the value(s) that need to be corrected.
- Type or wand in the correct values.
- Press the **Rotate** button, as many times as necessary to get the image right side up.
- Press the **Accept** button.

The application will transport you back to the Local Retrieve screen. It appears that the index keys are still the same, but this is the original display. Press the **List** button and the updated keys will appear.

Deleting Index Keys and Images

If one of the records is messed up and cannot be corrected, it may be deleted at this time. (That document should then be rescanned.) This action deletes both the index key and the image. After pressing the **List** button, put the cursor on the incorrect record and press the **Delete** button. The following screen will appear:
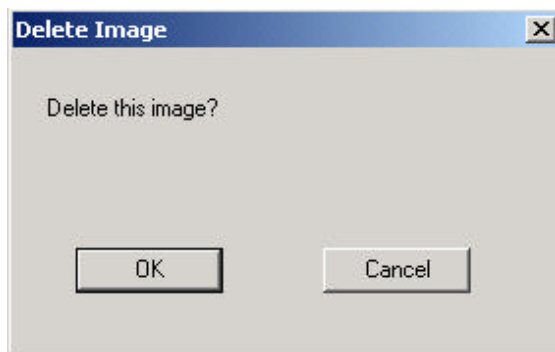
Click OK or press enter if you are sure this is the record you want to delete. Otherwise, click on Cancel.

Additional search hints:

The new search function in FILES2000 works differently than the search in the previous versions of FILES. The search values entered for a specific field (such as Julian Date) will search only that field. For example, if you enter a Julian Date search value of *9123*, only documents with that Julian Date will be displayed. If your database happens to have a document with a Serial Number of 9123, it will not be found by putting 9123 in the Julian Date key field.

Partial key searches normally will search for keys that <u>start</u> with the entered data. For example, entering a search value of N00 for DoDAAC, will find documents (if they are in the database) for N00104, N00208, N00312, etc.

If you want to find a document with a value anywhere in the key, you can put a wildcard character in front of the search criteria. The wildcard characters that you can use are:

    _ (Underscore character) = one character
    % (Percent sign) = any number of characters

For example, to find all documents for a DoDAAC regardless of the Service Designator Code used, you could enter _52691 to retrieve documents with DoDAAC keys of **N**52691 and **V**52691. Also for example, to find all documents for a julian date regardless of the DODAAC, you could enter %1330 to retrieve document numbers W33DRL**1330**Z001 and S9CEEA**1330**A001.
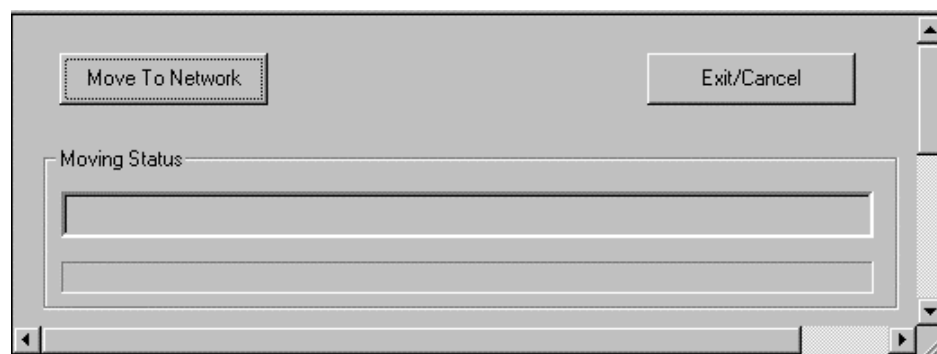
Move to Network

When all documents have been scanned and key data entered, you can use this function to move the images and key data from your local hard drive to the network storage location. This will make all documents available to all users on the FILES2000 system. Until this function is done, the images can only be viewed on your workstation.

To go to Move To Network from the main menu, perform one of the following:

- Click on the **Move To Network** icon on the toolbar.
- Select **Document, Move To Network** from the menu bar.
- Use the hot keys Ctrl + M.

The system will take you to the following screen:

Note: You can only do this if your workstation has been set up as a scanning station.   (See Utilities section later)

Move to Network Screen

To move the images and data, click on the **Move to Network** button. Progress on the moving of the images will be displayed in the **Moving Status** area. When the moving has successfully finished the **Moving Status** will display "**Move Completed: Record Count: XX.**"   If an error occurs and the move is unsuccessful, a Message Box will appear. Get a screen print of this and take immediately to your local FILES administrator. Click on the **Exit/Cancel** button after the move is completed or if you want to leave this screen without moving the images to the network.
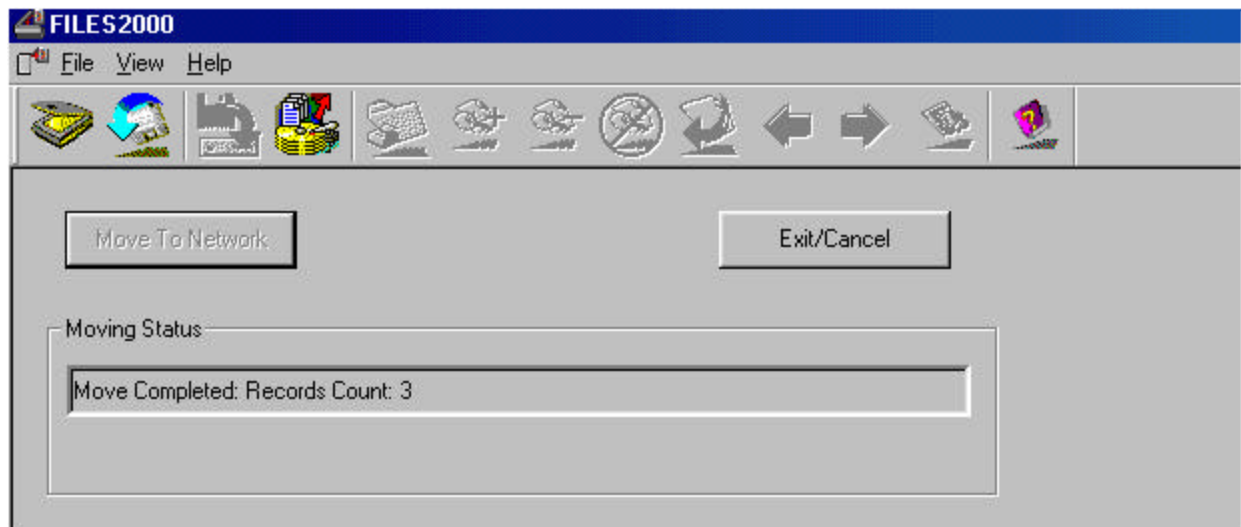
Example of a move completed successfully

Note: It is recommended that this function be performed after every 1 – 3 batches scanned!

Retrieving Images from the Network Drive

After document images have been moved to the network storage location, they can be retrieved based on key data using the Retrieve from Network function. Due to the large number of images that can be stored on the network or jukebox, you **must** enter at least one search criteria value. This is the only significant difference between searching the local drive and the network drive. This function is used by anyone at a Retrieval Station doing research. The network drive may be a jukebox, single optical drive, network drive, Network Added Storage (NAS) device, or something else. It refers to wherever the images and database are permanently stored.

To go to Retrieve Images from Network from the main menu, perform one of the following:

- Click on the **Retrieve Images from Network** icon on the toolbar.
- Select **Document, Retrieve Images from Network** from the menu bar.
- Use the hot keys Ctrl + R.

The system will take you to the following screen:

Note: You can do this from any FILES workstation.

1. Click on the **Document Type** drop down box and select the desired document type. The search keys in the grid on the left will change to the appropriate keys for the selected document type.

2. Enter search values for as many keys as you desire. You can enter an entire key value (example DoDAAC = N52691) or just a partial key (at least 3 characters). Since you are retrieving from the network, you must enter **at least one** search value. You must also select a document type.

Note: For the document type Converted from DOS, FILES2000 will search all of the fields for the search values you enter.

3. You may enter a number in the **Starting Page** box to skip over the first documents found in the search. If you enter 25 in this box, the first document listed in the **Search Results** will be the 25th document found that matches the search criteria.

4. When you have entered the search criteria, the buttons across the middle of the screen will provide the following functions:

- **Count** - The number of documents matching the search criteria will be displayed in the **Number of Pages** field and on the title bar of the **Search Results** grid.

- **Display** - This will display the first document matching the search criteria. Once you are on the display screen, you may use the arrow icons on the toolbar to move to other matching documents (if any).

- **Change** – This button is disabled. Users cannot change key values once they have been written to network storage.

- **List** - This button will display key data for the first 15 documents matching the search criteria.

- **More** – The grid will display only 15 documents at a time. If there are more than 15 documents to be displayed, this button will update the display grid with information for the next 15 documents.

- **Previous** - The grid will display only 15 documents at a time. If there are more than 15 documents to be displayed, this button will update the display grid with information for the previous 15 documents if you have moved past the first group of 15.

- **Print** - The currently selected document will be printed.

- **Delete** – This button is disabled. Users cannot delete records once they have been written to network storage

- **Print Header** – If this box is checked, header information listing all of the keys for the selected document will be printed on a separate page from the image.

- **Clear** – This button will clear all of the search criteria values that you have entered in the search criteria grid.

- **Cancel** – This will return you to the main menu screen.

- **Help** – This will display this help file.

Additional search hints:

The new search function in FILES2000 works differently than the search in the previous versions of FILES. The search values entered for a specific field (such as Julian Date) will search only that field. For example, if you enter a Julian Date search value of *9123*, only documents with that Julian Date will be displayed. If your database happens to have a document with a Serial Number of 9123, it will not be found by putting 9123 in the Julian Date key field.

Partial key searches normally will search for keys that <u>start</u> with the entered data. For example, entering a search value of N00 for DoDAAC, will find documents (if they are in the database) for N00104, N00208, N00312, etc.

If you want to find a document with a value anywhere in the key, you can put a wildcard character in front of the search criteria. The wildcard characters that you can use are:

    _ (Underscore character) = one character
    % (Percent sign) = any number of characters

For example, to find all documents for a DoDAAC regardless of the Service Designator Code used, you could enter _52691 to retrieve documents with DoDAAC keys of **N**52691 and **V**52691.

For example, to find all documents for a julian date regardless of the DODAAC, you could enter %1330 to retrieve document numbers W33DRL**1330**Z001 and S9CEEA**1330**A001.

Save As Function:

FILES2000 gives users the capability to take any viewed image and save it in another place. To use this feature, you must be viewing an image. Click on the **File** menu, then the **SaveAs**.   The standard Windows Save window appears and you select which folder you want to save it in and the name you want to assign it. The image is saved as a .jpg file.

Printing

This application offers three print options when viewing an actual image or selecting a document from a list of images:

- Use Ctrl+P to select the Print command button
- Use the **Toolbar Print** Icon
- Use the Menu Bar File, Print command to print the displayed information. You have the option of either printing the information in Portrait or Landscape mode.

The image will be printed full-sized on a sheet of paper. As explained in the Retrieval portions of this guide, if the Print Header box is checked, all index information for this image will be printed on a separate sheet of paper.
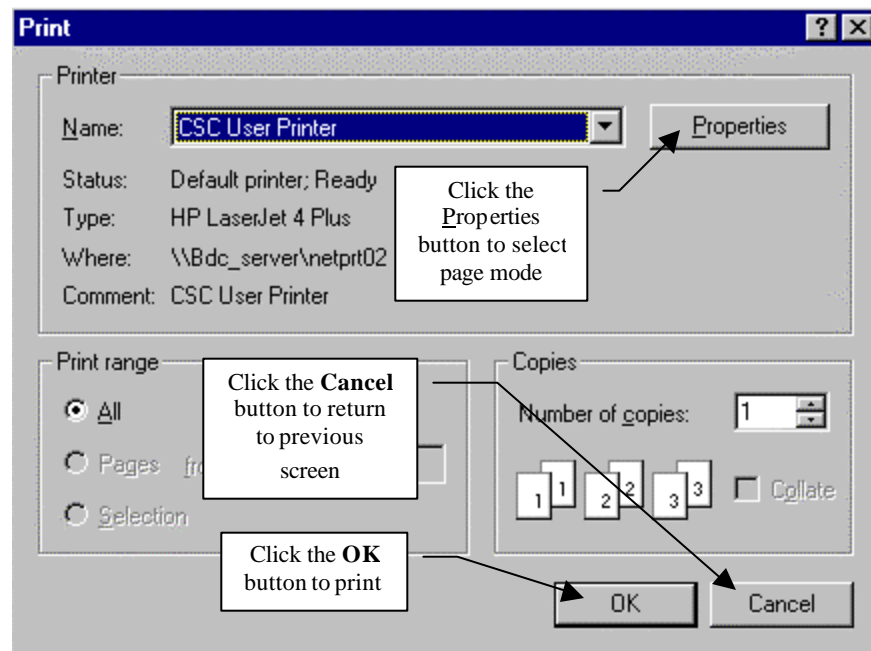
Print Screen

Utilities
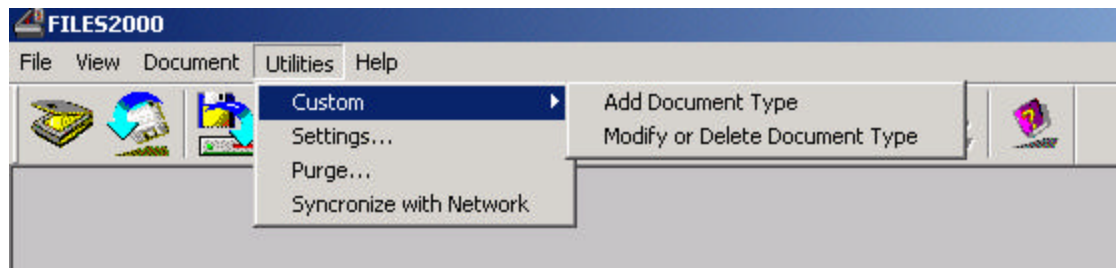
Only the FILES2000 administrator at each site may use the utility functions. You must enter the administrator's password to use any of the Utility functions. When you select one of these functions from Utilities on the menu bar above, the following Enter Password dialog box will appear.
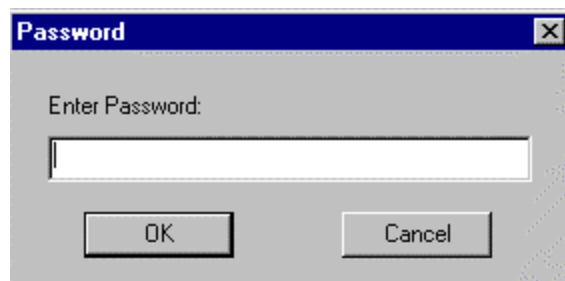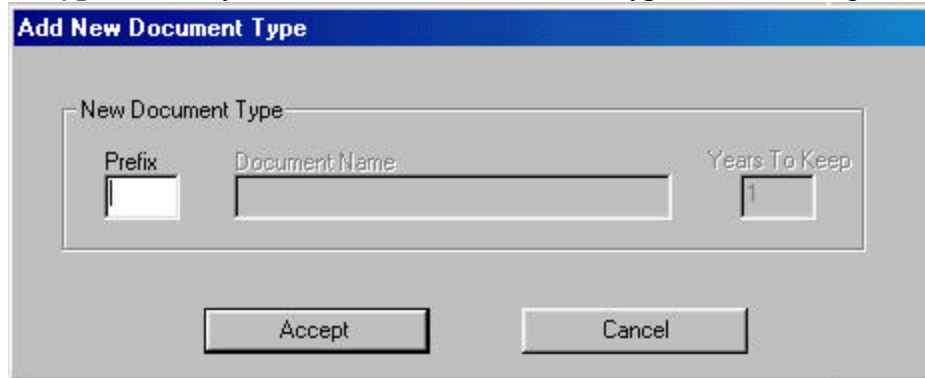

Utilities Password Screen

If you enter the correct password, the screen for the selected function will appear.

Custom

The Custom option is used to create new document types and correct or delete current document types.

Add Document Type. When you select the Add Document Type, the following screen appears:

Add New Document Type Screen

To create a new document type, click on the **Add New Document Type** button. In the pop-up box, enter a Prefix letter to be used by FILES2000 to identify this document type. If the prefix you enter is not already in use, you can then enter a Document Name. The document name will be used in the Document Type drop-down boxes throughout FILES2000. You must also enter a number of Years To Keep. Documents in this type can never be purged before they are this old.   Click on **Accept** to save the Document Prefix, Document Name, and Years To Keep that you entered. You will then see the following almost blank Keys for Document Type grid:

The specific function of each profile entry (column) is:

- **Seq Nr** – The sequence number controls the order or sequence in which the keys will be displayed on the data entry and search criteria grids.

- **Field** – This is the name that will be displayed for each key on the data entry and search criteria grids.

- **Field Size** – This determines the maximum number of characters that can be entered for the key. The maximum value you can use is 30.

- **Default** – If you want a default value to be displayed for this key field, enter it here. During key data entry (by the scanning operator), this value will be displayed as the default in the data entry grid. The scanning operator can type over the default value when needed.

- **Mandatory** – Check the box in this column if this field is a required entry for this document type.

- **Run On --** If you check this box, data entered in excess of the Field Size will automatically move to the next field on the data entry grid. If this box is not checked, excess characters entered will be ignored.

Enter information for the keys for your new document type. Press the Tab key to obtain a new line. When you save your new document information, it will be saved on both the local workstation and on the network server. The keys should be in the order that the primary user(s) desires. Mandatory entries should come first, before any optional entries. **MAKE SURE** you get this right before starting to scan and put images under this document type.

At this time the new document type will be valid only on the workstation where it was created. To add this new document type to other workstations, you may add it manually as above or wait until a Move To Network is done and the new document type will be added automatically.

If the prefix you select when trying to add a new document type is already in use, and you are attempting to create a new document type, click on Cancel when the warning message appears. You must choose another prefix before clicking on the Add New Document Type button again.

Modify or Delete Document Type. When you select the Modify or Delete Document Type, the following screen appears:

To edit the profile of an existing document type, select the document type from the Document Type drop down box at the top of the screen. The Keys for Document Type grid will display the profile for the selected document type. The columns in this grid display the profile entries for each key data field defined. To change an entry, click on the appropriate cell in the grid and change the displayed data.   See the following example:

Note 1: If there are images already stored on network storage for the document type you want to modify, you will not be able to add a row, delete a row, or change the sequence numbers.

Note 2: The cursor must NOT be left on a line where any changes are made. It must be tabbed to the next line for changes to be accepted and processed.

When you are done editing the profile information, click on the **Save** button.

If you want to delete a Document Type, press the **Delete Document Type** button. You will not be permitted to do this if there are images already stored on network storage for that particular document type.

Settings

The settings dialog box provides three functions on separate tabs. Click on the appropriate tab title to see the related settings.

- Paths to Database/Images

- Password

- Station Permissions

Paths to Database/Images

This screen is used to identify the locations for storing the image files and the database files that contain the key data, as well as the location of the Log File. Normally each of the entries will be different. The entries for Local Drive will be used to store images as key data is entered. This should be on the local hard drive of the scan station for fastest processing. The entries for the Network Drive will be used when images are "moved to the network" and for Network Retrieval. This should be a true network location accessible by all FILES2000 workstations. To set any of these entries, click on the **Browse** button for the entry and locate the desired drive and directory. Normally, none of these will be changed once they are set up.
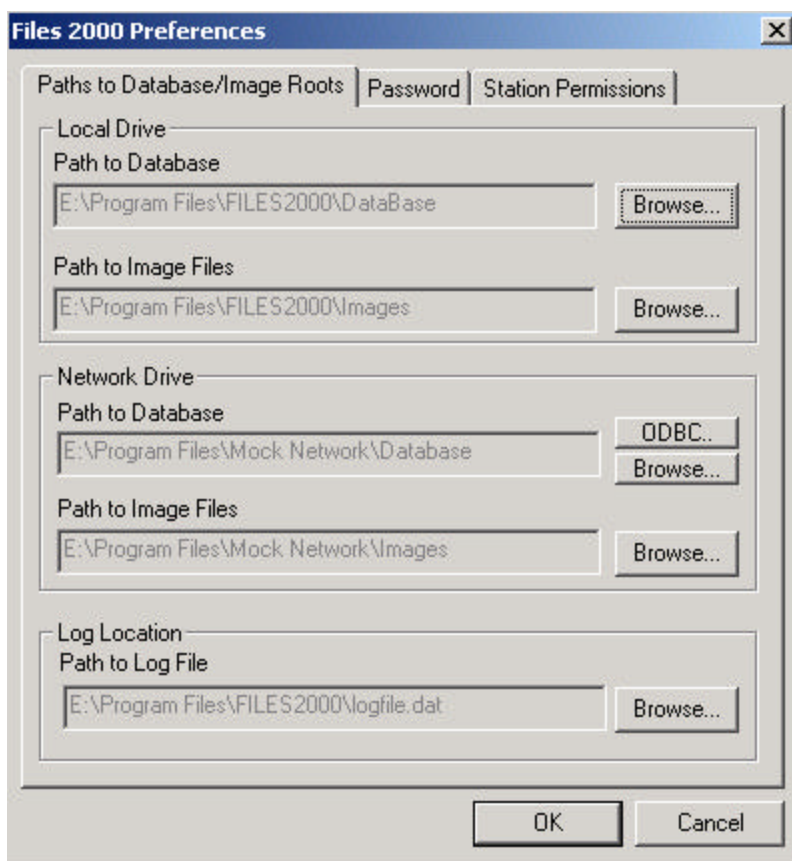
When the **Browse** button is selected, the browse for folder pop-up window is displayed for selection for the desired file path.
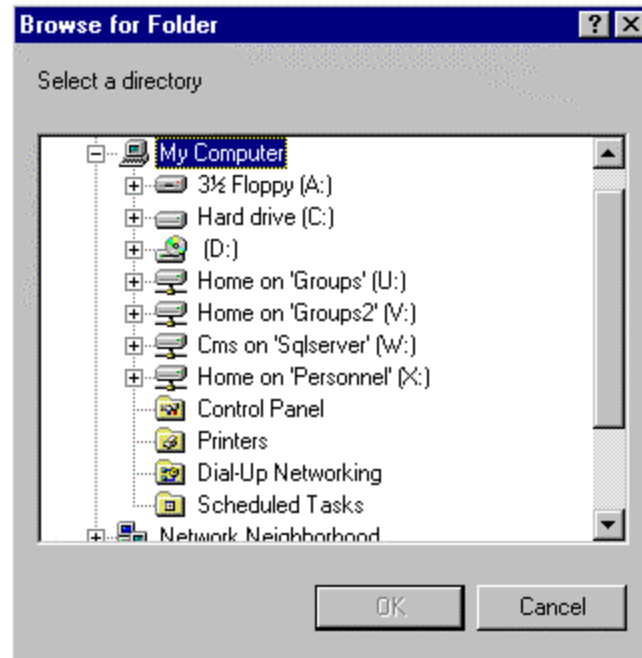
Browse for Folder Screen

Find the correct location and click on **OK** to save any changes. Click on **Cancel** to keep the original entries.

When the **ODBC** button is selected, the following sample pop-up window is displayed for selection for the desired file path. Select Files2000 and click on **Accept.**
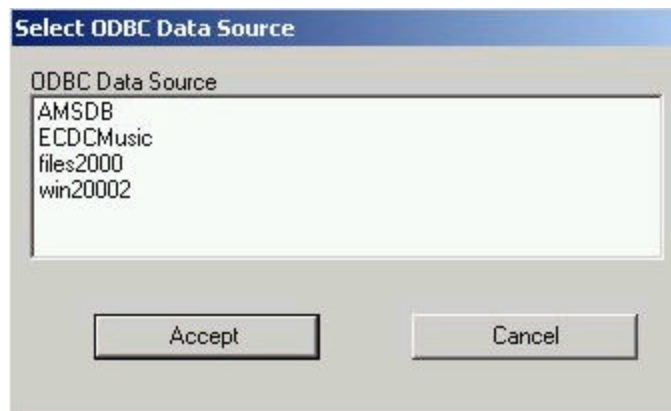
Note: You will only do this if your site is using an SQL database for your network database. Refer to Release 1.6 instructions for details on how to set this up.

Log Files.

General.
- A logfile should be set up on the server uniquely identifying each scan station.
- This logfile will keep track of how many images are moved to the network
- The administrator can view it by going into WordPad or WORD.

From a FILES scan or administrator station,

- Create a new folder in the area where FILES2000 resides on the network.
- Name it Scanner Log Files, or something like that.
- Move the original logfile.dat into that folder.
Note: The logfile.dat file is not created until the first move to network is done on the scanning workstation.
- Copy and paste it into same folder.
- Do for however many number of scan stations you have.
- Rename each one a distinctive name (e.g. Receiving1, Daves, etc.)
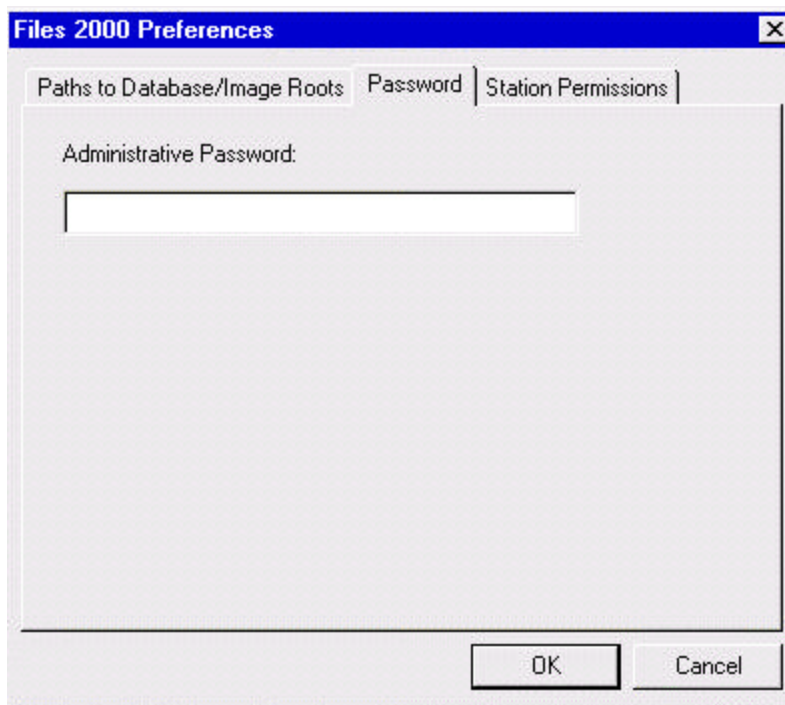- Set Windows so that when it sees the .dat WordPad is brought up.

At each scan station:

- Go to Utilities, Settings.
- For Log Location, click on **Browse** button.
- Find the file created above for this scan station.
- Highlight it and click.
- Click on **OK** button.

Password

Use this screen to change the **Administrative Password**.

Click on **OK** to save any changes. Click on **Cancel** to keep the original entries.

Password Screen

Station Permissions

This screen will determine the allowed functions for this workstation. If this station is only for retrievals from the network drive or jukebox, click on the **Retrieve Only Functions** option circle. If this is a scanning workstation, one of **All Functions** must be selected. If "Using internal scan settings" is selected, users will adjust scanner settings within FILES2000. The "Using driver dialog" option will allow FILES2000 to utilize the TWAIN driver from the scanner. Each brand of scanner has its own different driver dialog screen. FILES2000 will bring up that screen for users to adjust scanner settings.

The **Workstation ID** must also be entered. This ID is used in the storing of images on the network. It is part of the foldering scheme, along with year, month and day. The system assigns "default" and you should update it with a name that uniquely identifies this scanning station.

The **Barcode Scan Resolution** is an optional entry for use with barcode recognition. In general it should be set to at leat 300 dpi to read a barcode. The setting you use depends the resolution capabilities and speed of your scanner.

Click on **OK** to save any changes. Click on **Cancel** to keep the original entries.
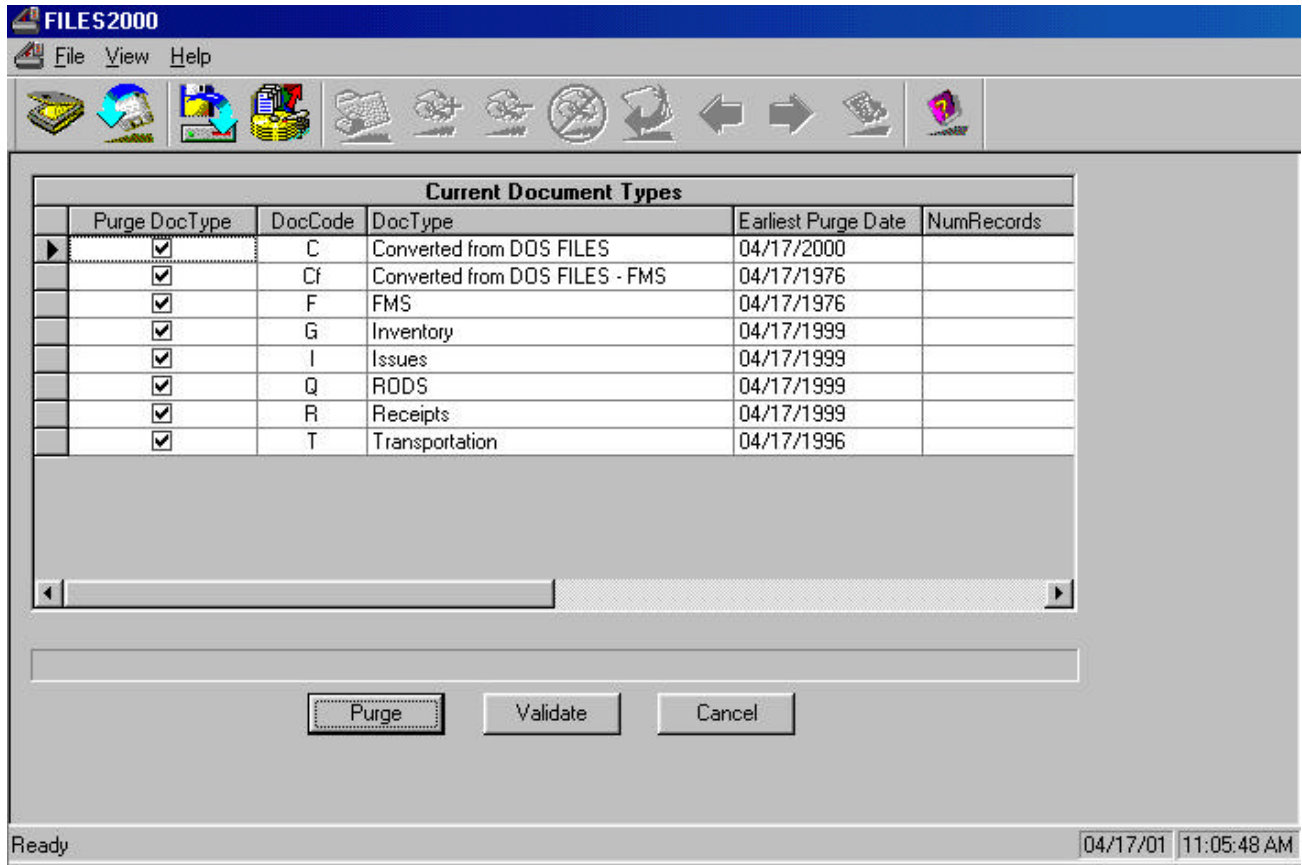
Station Permissions Screen

Purge

When you choose the Purge option from the Utilities menu, the following screen appears:

This screen displays all the current document types in the network storage. The Purge Doc Type default setting is on, to include in the purge. The Earliest Purge Date is computed based on today's date and the number of Years To Keep setting for each document type. In the example above, the Issue document type has a Years To Keep of 2. This means no documents less than two years old from today's date can be purged.

Steps to do a purge:

- Deselect any document types you don't want to purge

- You may change the Earliest Purge Date to something else less restrictive if desired. For example, you could change the date for Issues to 4/17/1998. You cannot change the date to anything that is less than two years. Be sure this date is what you want before proceeding!

Note: This does not change the original setting, only the criteria for this particular action.

- Press the **Validate** button. FILES2000 will scan the database and return the number of records that will be purged. See example below
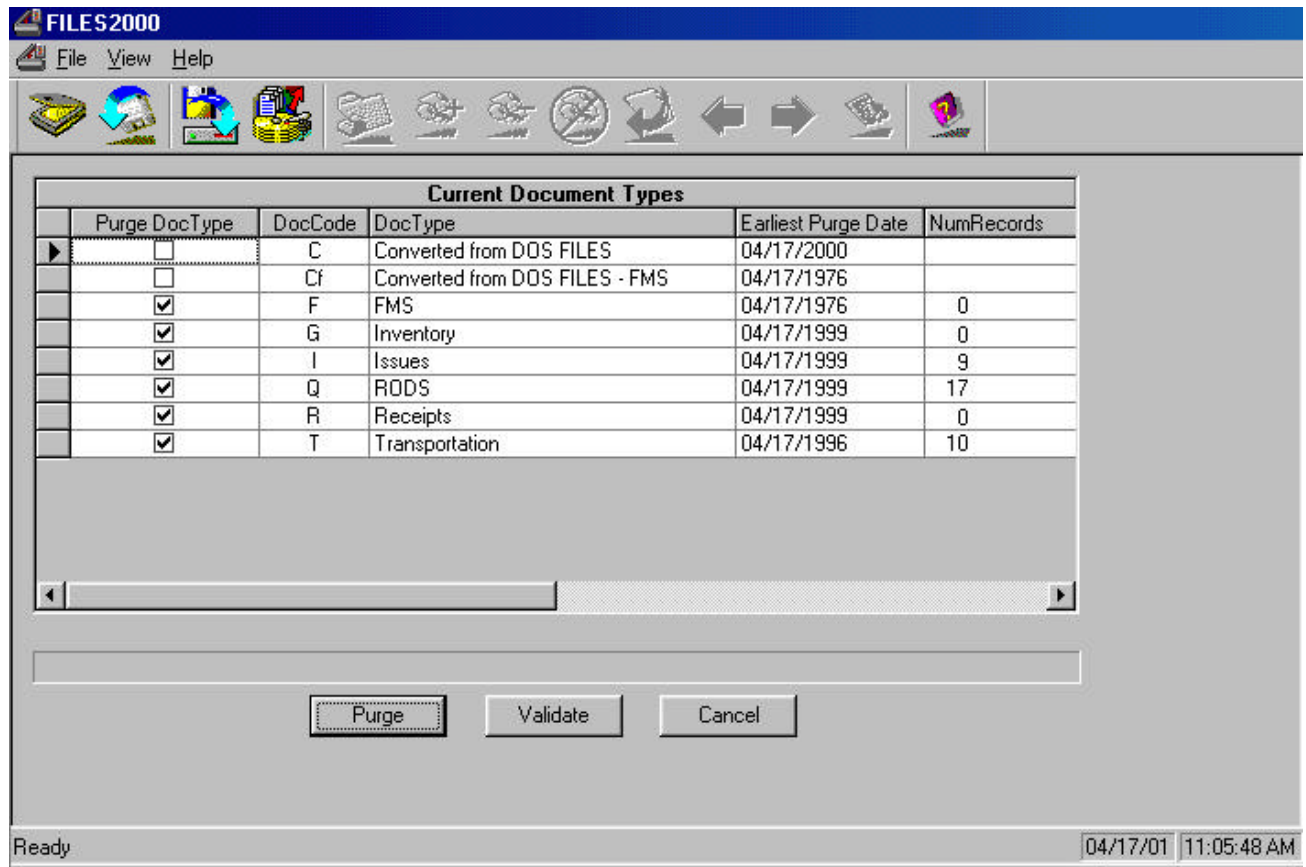

- Press the **Purge** button. The appropriate images and associated database rows will be purged. They are NOT archived. So be sure you want to get rid of these images and index keys.

Synchronize with Network

This option enables the FILES2000 administrator to ensure that the document types and index keys of a particular scanning station are in synch with those of the network database. This prevents a user from assigning keys to scanned images that aren't the standard index keys or in the wrong order. The local database on the scanning station is modified to match that of the network database. The action takes place for this scan station only. This action should be taken periodically on all scan stations to promote uniformity.

When this option on the menu bar is selected, the application automatically does the synchronization. When complete, the following display appears:
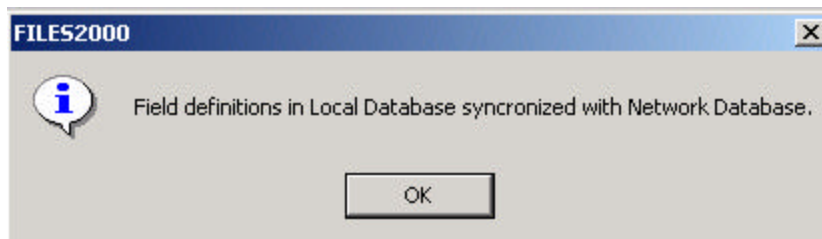
Click on the **OK** button or press the **Enter** key to go on to another menu selection.